

DO NOT FILE THIS DOCUMENT WITH THE COURT.

Cause Number: _____
Fill in cause number and exactly as assigned when the original petition was filed.

In the Matter of the Marriage of

Petitioner: _____
Print first, middle and last name of the spouse filing for divorce.

In the _____
(Court Number)

And

Respondent: _____
Print first, middle and last name of other spouse

District Court
 County Court at Law

County, Texas

And in the interest of the following child(ren)

1. _____ 2. _____

Required Initial Disclosures in Dissolution of Marriage

Parties to suits for divorce, annulment, or to declare marriage void must give the other party this information, as required by Texas Rule of Civil Procedure 194.2.

Keep a completed copy of this form for yourself. Attach the documents (like bank statements) that are required. You can attach additional pages on separate sheets of paper if you need more space for listing information.

You must give this information to your spouse no later than 30 days after either party files an answer, waiver of service, or counter-petition with the court clerk. You and the other party may agree in writing to waive the initial disclosures. Forms to waive initial disclosures by Rule 11 Agreement are available at TexasLawHelp.org.

If a question does not apply to your case, write "N/A," "none," or leave it blank. For example, if you have no property to list in a particular category, write "none."

1. Correct names and addresses of parties to the lawsuit.

See Texas Rule of Civil Procedure 194.2(b)(1).

Petitioner: _____
First Middle Last

Street Address City State Zip

Phone Email

Respondent: _____
First Middle Last

Street Address City State Zip

Phone Email

List the full names and dates of birth of the child(ren).

DO NOT FILE THIS DOCUMENT WITH THE COURT.

Child's name	Date of Birth	Place of Birth	State where child lives now
_____	_____	_____	_____
_____	_____	_____	_____

2. Potential parties to the lawsuit.

See Texas Rule of Civil Procedure 194.2(b)(2).

You must provide the names, addresses, and telephone numbers of any potential parties.

Check any that apply. If none apply skip to next section.

The Office of the Attorney General—Child Support Division (OAG). The local field office address and phone number are: _____

The Texas Department of Family and Protective Services. The office address and phone number are: _____

Other: _____

3. Legal theories and factual bases of claims or defenses.

See Texas Rule of Civil Procedure 194.2(b)(3).

The pleadings in this case contain the legal theories and general factual bases for claims, or defenses.

4. Amount and any method of calculating economic damages.

See Texas Rule of Civil Procedure 194.2(b)(4).

At the time of this initial required disclosure, economic damages have not been pled for as part of this family law case. No response to this request is needed at this time. If an amended petition or counterpetition is filed that alleges economic damages, a response to this request will be made within 30 days of the filing of the amended petition or counterpetition.

DO NOT FILE THIS DOCUMENT WITH THE COURT.

5. Persons with Knowledge of Relevant Facts (Potential Witnesses)

See Texas Rule of Civil Procedure 194.2(b)(5).

You also need to give the other side the names, phone numbers, and addresses of potential witnesses—that is, people with knowledge of relevant facts. What is each person’s connection with the case? The list should include all potential witnesses regardless of who they would be testifying for. Attach another sheet of paper if you need more room.

IF this case is contested, this list could include family members, neighbors, teachers, doctors, counselors, employers, and financial advisors, among others.

Name	Address	Phone number	Connection to case

6. Documents, electronic items, or tangible things.

See Texas Rule of Civil Procedure 194.2(b)(6).

The following is a list of documents, electronically stored information, and tangible things that have been identified that may be used to support a claim or defense in this case. This Response will be supplemented, as needed, as responsive items are identified

Describe documents, electronically stored information, and tangible things that you have in your possession, custody, or control, and may use to support your claims or defenses. The list of documents, electronic items, or tangible things should include all items in your possession that you might want admitted as evidence in your case.

No.	Item/Name of Item or Document	Type of Item (Document, electronic info, or tangible item)	Location of document or item	Brief Description of document or item
1				
2				

If not producing copies of all the documents; access to electronically stored information; and tangible things, a reasonable time and method for the production of these items is:

DO NOT FILE THIS DOCUMENT WITH THE COURT.

7. Indemnity and insuring agreements

See Texas Rule of Civil Procedure 194.2(b)(7).

Produce the originals or copies of any indemnity and insuring agreements described in Rule 192.3(f).

(Check one).

- At the time of this initial response no indemnity and insuring agreements have been identified. This Response will be amended, as needed.
- Any indemnity and insuring agreements that have been identified are attached. This Response will be amended, as needed.

8. Settlement agreements.

See Texas Rule of Civil Procedure 194.2(b)(8).

Produce the originals or copies of any settlement agreements described in Rule 192.3(g) of the Texas Rules of Civil Procedure. Rule 192.3(g) provides in part as follows: Settlement Agreements. A party may obtain discovery of the existence and contents of any relevant portions of a settlement agreement.

(Check one).

- The Parties have not entered into any active settlement agreements that would resolve, or partially resolve, the disputed issues in this case. This Response will be amended, as needed.
- Any active settlement agreements that would resolve, or partially resolve, the disputed issues in this case are attached. This Response will be amended, as needed

9. Witness statements

See Texas Rule of Civil Procedure 194.2(b)(9).

Produce the originals or copies of any witness statements described in rule 192.3(h) of the Texas Rules of Civil Procedure.

(Check one).

- Attached to this response are copies of any witness statements that have been made by any of the individuals identified in the fifth response above. This Response will be amended, as needed, as qualifying witness statements are discovered or obtained in this case.
- No witness statements are available at this time. This Response will be amended, as needed, as qualifying witness statements are discovered or obtained in this case.

DO NOT FILE THIS DOCUMENT WITH THE COURT.

10. Medical records or bills.

See Texas Rule of Civil Procedure 194.2(b)(10).

Produce copies of all medical records and bills that are reasonably related to the injuries or damages asserted or, in lieu thereof, an authorization permitting the disclosure of such medical records and bills.

At the time of this initial response, this family law case does not allege physical or mental injury, and therefore is not requesting damages resulting from any physical or mental injury. Therefore no response to this request is needed at this time. This Response will be amended, as needed.

11. Medical records or bills from 3rd party authorizations.

See Texas Rule of Civil Procedure 194.2(b)(11).

Produce copies of all medical records and bills that you have obtained by using an authorization that the other party gave you.

At the time of this initial response, this family law case does not allege physical or mental injury, and therefore is not requesting damages resulting from any physical or mental injury. No response to this request is needed at this time. This Response will be amended, as needed.

12. Responsible 3rd parties.

See Texas Rule of Civil Procedure 194.2(b)(12).

State the name, address, and telephone number of any person who may be designated as a responsible third party.

At the time of this initial response no responsible third parties have been identified. This Response will be amended, as needed.

DO NOT FILE THIS DOCUMENT WITH THE COURT.

Required Initial Disclosures for Family Law Cases

See Texas Rule of Civil Procedure 194.2(c).

1. Information Related to Real Property

See Texas Rule of Civil Procedure 194.2(c)(1)(A)

You need to gather documents related to real property. Give your spouse:

- All deed and lien information on any real property owned, and
- All lease information on any real property leased.

You will need information that goes back for the past two years, unless you have been married less than two years. If you have been married less than two years, you give your spouse documents going back to the date you got married.

This can include things like deeds, closing documents, and mortgage statements. And you need to include documents related to property you owned before the marriage or inherited.

If you do not have access to the accounts, and your name is on the account, you need to make a good faith effort to get the documents. For example, you can reach out to the title company, landlord, or lender.

Property Address/Location	Closing Documents attached (Y/N)	Mortgage Statements attached (Y/N)	Home Equity LOC documents attached (Y/N)	Date of Purchase	Lease documents attached? (Y/N)

2. Information Related to Pensions and Retirement (including SEP/IRA, IRA's, 401k accounts, profit-sharing or other employee benefit plan)

See Texas Rule of Civil Procedure 194.2(c)(1)(B).

If you do not have access to the accounts and your name is on the account, make all efforts to get the documents. You will need information that goes back for the past two years, unless you have been married less than two years. If you have been married less than two years, you give your spouse documents going back to the date you got married.

DO NOT FILE THIS DOCUMENT WITH THE COURT.

Company name/Financial Institution Name	Last four digits of Account No.	Description of documents	Current Balance/Date

3. Insurance Policies: Life, Homeowners, Automobile and Health

See Texas Rule of Civil Procedure 194.2(c)(1)(C).

If you do not have access to the accounts and your name is on the account, make all efforts to get the documents. You will need information that goes back for the past two years, unless you have been married less than two years. If you have been married less than two years, you give your spouse documents going back to the date you got married. . If your name is on an account, you have “constructive possession” of the documents and you must diligently try to get copies.

Insurance company name	Type of coverage	Last four digits of policy number	Declaration Page attached to this form? (Y/N)	Invoices for premiums attached to this form?	Name of person who pays

DO NOT FILE THIS DOCUMENT WITH THE COURT.

4. Information Related to Bank Accounts

See Texas Rule of Civil Procedure 194.2(c)(1)(D).

If you do not have access to the accounts and your name is on the account, make all efforts to get the documents. You will need information that goes back for the past two years, unless you have been married less than two years. If you have been married less than two years, you give your spouse documents going back to the date you got married.

Name of Bank, Federal Credit Union, Savings and Loans, Brokerage Firms	Last four digits of account number	Description of documents	Current Balance/Date

5. Health Insurance Policies available for child(ren) and spouses

See Texas Rule of Civil Procedure 194.2(c)(2)(A)

In a suit in which child or spousal support is at issue, a party must, without awaiting a discovery request, provide to the other party: (A) information regarding all policies, statements, and the summary description of benefits for any medical and health insurance coverage that is or would be available for the child or the spouse).
If you do not have access to the accounts and your name is on the account, make all efforts to get the documents. You will need information that goes back for the past two years, unless you have been married less than two years. If you have been married less than two years, you give your spouse documents going back to the date you got married.

Insurance company name	Last four digits of policy no.	Type of Coverage	Declaration Page/Premium invoices attached? (Y/N)	Name of person who pays

DO NOT FILE THIS DOCUMENT WITH THE COURT.

6. Federal Income Tax Information

See Texas Rule of Civil Procedure 194.2(c)(2)(B).

If child support, spousal support, or both are part of this case: Attach two years of returns (if you do not have possession of the return, log into www.irs.gov and request a copy of the transcript AND the return)

Have you attached it? Y/N (circle one)

Attach IRS Form W-2's, IRA Form 1099's and Schedule K-1 for the previous two years

Have you attached it? Y/N (circle one)

7. Payroll Information

See Texas Rule of Civil Procedure 194.2(c)(2)(C).

If child support, spousal support, or both are part of this case: Produce complete copies of your **two** most recent payroll check stubs (log into your employee account, request from your human resources department, request from company office manager/bookkeeper).

Have you attached it? Y/N (circle one)

Signature.

I have completed the required disclosures and I have served them on my spouse.

Your signature: _____

Your printed name: _____

Certificate of Service

I certify that a copy of the Required Disclosures and attached documents were served on my spouse, _____ (name of your spouse) on _____ (date), by (Check all that apply):

- electronic file manager (e-filing)
 - email
 - first class (regular) U.S. Mail
 - certified U.S. Mail
 - registered U.S. Mail _____ (date).
 - by fax, to _____ (number).
 - personal delivery by (me/my agent) (circle one).
 - commercial courier delivery service (such as Federal Express).
 - giving a copy to my spouse's lawyer, _____ (lawyer's name)
- via one of the above methods.

Your signature

Note: For information about divorce in Texas, including how to file an answer, go to www.bryanfagan.com.

Ready to take the first step towards your goals? Call **281-810-9760** now to schedule your free consultation. Don't wait, your future starts with a simple phone call.